

# HMIS Agency Data Administrator Training

Friday, 11/17/2023, 1:00 pm

GoTo <https://meet.goto.com/323811013>

## Presenters:

Julie Burdick, David Lake, Becky Sutton

## Attendees:

See Attached Sign-in Sheet

Introductions & Agenda Review	Notes available online for review, <a href="https://dupagehomeless.org/hmis/ada">dupagehomeless.org/hmis/ada</a> .
Updates	FY2024 Data Standards Q&A <ul style="list-style-type: none"><li>– Discomfort in asking certain questions such as sexual orientation. CC's created a script to assist users when asking the question.</li></ul>
	User Training and Workflow updates <ul style="list-style-type: none"><li>– All videos have been reviewed and are in the process of re-recording the new user videos.</li><li>– Updated version of the Standard Workflow available online and in TalentLMS.</li><li>– Working on a more comprehensive Standard Workflow document to provide more detail to assist a new user.</li><li>– Will be updating the ESG CAPER and Coordinated Entry workflow documents.</li></ul>
	APR/CAPER delays <ul style="list-style-type: none"><li>– Updated reports expected by 12/8.</li><li>– HUD is not granting an extension, rather they will not penalize programs who could not submit reports on time due to these delays.</li><li>– HUD expecting reports to be submitted by 12/15.</li><li>– Keep a copy of the vendor's notice on file. (attached)</li></ul>
	Federal Reporting Dates <ul style="list-style-type: none"><li>– Longitudinal System Analysis (LSA) final upload by 1/17/24. Draft upload completed. Working through errors and warnings. Some examples include:<ul style="list-style-type: none"><li>– Project overlaps</li><li>– Incongruent responses</li><li>– Missing data</li><li>– Bed Unit Inventory (BUI) counts not aligning with persons served in the project throughout the year.</li><li>– System Performance Measures (SPM) early Feb.</li><li>– Annual Sheltered/Unsheltered Point-in-Time (PIT) and Housing Inventory Count (HIC) TBD.</li></ul></li></ul>
	DuPage County Email updated from <a href="https://dupageco.org">dupageco.org</a> to <a href="https://dupagecounty.gov">dupagecounty.gov</a> .
Common Questions/Concerns	End User Agreements <ul style="list-style-type: none"><li>– End user agreements are coming over unsigned.</li><li>– Updated new user training assignment to stress the need to sign.</li><li>– User agreements to come through the TalentLMS assignment or the help desk ticket.</li></ul>
	Annual Reviews <ul style="list-style-type: none"><li>– Reviews to be completed 30 days+/- from the Head of Households Project Start Date.</li><li>– Interim Review should be marked as an annual type.</li></ul>

	<ul style="list-style-type: none"> <li>– Remind staff to review the entire assessment(s) for all members before selecting save.</li> </ul>
	<p>Program Overlaps</p> <ul style="list-style-type: none"> <li>– A client cannot be in 2 beds on the same night (i.e. emergency shelter bed and a RRH bed).</li> <li>– A client should not be receiving ongoing housing assistance from 2 projects at the same time. There may be rare cases where a program is paying for the security deposit and the other program is paying for ongoing rental assistance. The program paying for the security deposit should be a quick open and close enrollment and no bed inventory should be applied.</li> </ul>
Reports/Data Needs	<p>Reports that have been Updated (BO)</p> <ul style="list-style-type: none"> <li>– 0628 - HIC Supplemental (WellSky retiring, locally updated)</li> <li>– 0630 - Sheltered-Unsheltered PIT (locally updated, pending WellSky update Feb/March)</li> <li>– 1305 - 2-1-1 U.S. Problems/Needs Report</li> <li>– Basic Demographics, Service, and EE Details</li> <li>– Call and Need Data</li> <li>– CDBG ESG Grant Application Report</li> <li>– DuPage CoC Coordinated Entry Output Report</li> <li>– DuPage CoC Coordinated Entry Prioritization List</li> <li>– Homeless Prevention Network Annual Report</li> <li>– IDHS Prevention</li> <li>– IDHS-ETH EFandS-2018-10-15 (Sub Cook)</li> </ul> <p>Business Objects Favorites – demonstrated how to mark folders and reports as Favorites to use as shortcuts.</p> <p>Next quarterly PIT (David)</p> <ul style="list-style-type: none"> <li>- Email to go out in the next couple of weeks outlining the details we normally use for creating the PIT reports, and preparation requests for Housing Inv + Funding information updates.</li> </ul> <p>Basic Demographic Report Demo (Julie)</p>
Upcoming Events	DuPage County Office Closures – 11/23-24, 12/25, 1/1/24
Upcoming Events	LSA Draft Submission – Wed., 11/29/23
	Annual Sheltered/Unsheltered PIT Planning Meeting - Wed., 11/29/23, 10 am, online
	LSA Final Submission – Wed., 1/17/24
	Agency Data Administrator Training – Fri., 1/26/24, 1 pm, online
	Data and Performance Committee – Wed., 2/14/24, 2 pm, online

# Agency Data Administrator Training

November 17, 2023 | 12:55 PM-2:33 PM

Meeting ID: 323-811-013

[View diagnostics](#)

Angelica Arias angelica.arias@dupageco.gov	1:00 PM – 2:33 PM	San Jose
Regina Williams regina.williams@serenityhouse.com	1:00 PM – 2:33 PM	Addison
Ozzy Salcedo ozzy@mshv.org	1:01 PM – 2:32 PM	West Chicago
Becky Sutton Rebecca.Sutton@dupageco.org	1:01 PM – 2:33 PM	New York
Joan Fox	1:02 PM – 2:33 PM	Chicago (Near South Side)
Tonya Latson tlatson@peoplesrc.org	1:03 PM – 2:33 PM	Morristown
David Lake hmis@dupagecounty.gov	12:56 PM – 2:33 PM	Elmhurst
Steven Fixler steven.fixler@dupageco.org	12:56 PM – 2:33 PM	Charlotte
Chris Madsen cmadsen@cc-doj.org	12:58 PM – 2:33 PM	Chicago (Near South Side)
Nereida Enriquez nenriquez@weareoutreach.org	12:58 PM – 2:33 PM	Elmhurst
Becky Sutton Rebecca.Sutton@dupageco.org	12:58 PM – 1:01 PM	New York
Joanna L	12:59 PM – 2:33 PM	Cicero

## Burdick, Julie

---

**From:** Burdick, Julie  
**Sent:** Thursday, October 19, 2023 9:54 AM  
**To:** Andrew Pertulakis; Christine Madsen; Donna Pocius (donna.pocius@ywcachicago.org); Fiore, Carrie; Fixler, Steven; Jen Coyer (JCoyer@dupagepads.org); Fox, Joan; LaFauce, Amy; Lake, David; Latson, Tonya; Nereida Enriquez; Osvaldo Salcedo (ozzy@mshv.org); Regina Williams; Sara Vainowski (svainowski@dupagepads.org); Scott Austgen; Snipes, Lisa; susan.espino@bridgecommunities.org; Sutton, Rebecca; Thomas, Kerry; Tori Shaffer; Valerie Tawrel  
**Cc:** HMIS Help Desk; Keating, Mary; Peggy Troyer; Hamlin, Julie; Baig, Momina  
**Subject:** FY24 Reporting Updates from our Vendor! - Delays Ahead  
**Attachments:** RE: FY24 Reporting Update

**Categories:** 15 Minutes, Vendor/Partner News, Reporting, Outgoing, Julie

We received **official** word, in WellSky's email below, that the FY24 updates to the APR/CAPER reports will not be available until **December 2023**.

As noted in our email yesterday (attached), HUD is requesting that those with reports due now through December need to request an extension through the local HUD Field Office rep. For ESG CV reports, requests must be submitted through the CARES representative. Please do not submit an AAQ through HUD.

Unfortunately, we do not have any additional information regarding these delays at this time. We ask that you share this information with others at your organization as appropriate.

### Julie Burdick (she/her)

HMIS Manager, DuPage County Community Services

421 N County Farm Rd., Wheaton IL 60187

Tel: 630-407-6462

[dupagehomeless.org/hmis](http://dupagehomeless.org/hmis) | [nilhmis.cayzu.com](http://nilhmis.cayzu.com) | [211dupage.gov](http://211dupage.gov)



---

**From:** WellSky Housing & Community Services <info@wellsky.com>

**Sent:** Wednesday, October 18, 2023 6:02 PM

**To:** Burdick, Julie <Julie.Burdick@dupageco.org>

**Subject:** HUD Reporting Update and Upcoming Releases

**[Caution: This email originated outside Dupageco.org. Do not click links or open attachments unless you recognize the sender and know the content is safe.]**



## WellSky important update

WellSky would like to provide you with information about the next upgrade to Community Services. Community Services 5.15.01 will be available as a **Minor** Release in the upgrader the week of October 23, 2023. This means that only sites that are not set up for automated upgrades will require scheduling.

This release version will include the following changes:

- Coordinated Entry Event
  - Resolved issue where Provider Lookup logic was not filtering or populating Providers correctly
- Client Merge
  - Resolved issue where "Error performing Assessment Visibility comparison" prevented merging client records
- Race and Ethnicity Mapping
  - Resolved issue where selecting both non-HUD and HUD values resulted in a Null value after upgrading to CS5.15.0.

Additional timeline information for HUD Reporting is available below:

### LSA

HUD announced on October 18, 2023, that the LSA submission window is expected to begin on November 13, 2023, and end on January 17, 2024. CoCs are expected to upload a draft submission by November 29, 2023. WellSky will announce the availability of the FY2023 LSA export on or before November 13, 2023, in a future announcement. There will be no required upgrade for the export's availability.

### CoC APR/ESG CAPER

WellSky plans to release the FY2024 CoC APR and the FY2024 ESG CAPER reports on December 8, 2023, as part of 5.15.02. WellSky advises grantees to reach out to their CARES Act Desk Officer for ESG-CV, or their CPD representative in the field office for APR/YHDP, to request submission extensions for grants due between now and mid-December. Each grantee must reach out directly, as HUD will not be able to grant a blanket

extension.

### **Coordinated Entry APR, DQF and PATH**

FY2024 versions of these reports are expected to be released mid to late December 2023. Grantees with Coordinated Entry APR deadlines between now and late December 2023 are advised to reach out to their CPD representative in the field office to request a submission extension. Each grantee must reach out directly, as HUD will not be able to grant a blanket extension. The PATH annual report deadline is December 31, 2023. Data Quality Framework data will be used in the FY2023 SPM submission in February 2024.

### **SPMs**

The SPM series of reports will be updated to the FY2024 specifications in January 2024. More information about release timing will be available near the end of the calendar year.

Please create a case in the Support Hub if you have any questions.



*Copyright © 2023 WellSky. All Rights Reserved.*

*11300 Switzer Road, Overland Park, KS 66210*

*To unsubscribe, please enter a case into the Support Hub or call 855-WELLSKY.*

If you no longer wish to receive these emails, click on the following link: [Subscription Center](#)

## Burdick, Julie

---

**From:** WellSky Housing & Community Services <info@wellsky.com>  
**Sent:** Thursday, November 2, 2023 11:08 AM  
**To:** Burdick, Julie  
**Subject:** HUD Reporting Submission Update

**[Caution: This email originated outside Dupageco.org. Do not click links or open attachments unless you recognize the sender and know the content is safe.]**



### WellSky important update

WellSky is sharing a communication from the HUD SNAPS office related to delayed APR/CAPER/CE APR/ESG-CV/YHDP reporting:

"This message serves as an update to a previous listserv from September 27th where HUD acknowledged communities were experiencing delays in submitting required reports because of challenges with HMIS Data Standards updates. In that message, HUD asked recipients to contact their Community Planning and Development (CPD) Representative for further guidance. We understand many of you have done this and are awaiting updated guidance.

HUD understands that, while HMIS vendors have been working diligently to address issues impacting reports, some systems are not able to generate required reports as of today. If the HMIS vendor delay is preventing a recipient from submitting a timely report, then HUD plans to treat it as an unforeseen circumstances beyond the Recipient's control and consider it a mitigating factor when monitoring for program compliance. Reports must be submitted to HUD as soon as practicable, which we currently estimate will be December 15. Please also maintain a record of the notification from the Recipient's HMIS vendor of delays in reporting implementation.

You do not need to contact your CPD representative at this time."

Please create a case in the Support Hub if you have any questions.